Using the Meeting Tracker

Administrator Guide

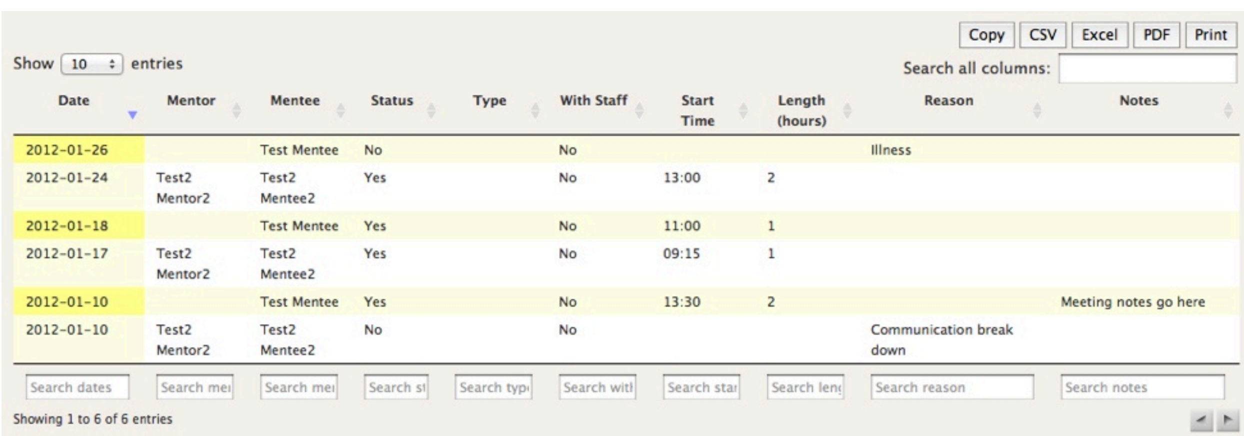
Table of Contents

Viewing Meetings

Viewing All Meetings

Go to the Meetings page. Meetings are listed in a table, with columns for:

- meeting date
- mentor name
- mentee name
- meeting status (whether the mentor and mentee met)
- meeting type
- whether the meeting was with SA-YES staff
- meeting start time
- meeting length
- reason for not meeting
- meeting notes


Copy CSV Excel PDF Print

Show 10 entries

Search all columns:

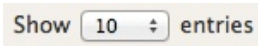
Date	Mentor	Mentee	Status	Type	With Staff	Start Time	Length (hours)	Reason	Notes
2012-01-26		Test Mentee	No		No			Illness	
2012-01-24	Test2 Mentor2	Test2 Mentee2	Yes		No	13:00	2		
2012-01-18		Test Mentee	Yes		No	11:00	1		
2012-01-17	Test2 Mentor2	Test2 Mentee2	Yes		No	09:15	1		
2012-01-10		Test Mentee	Yes		No	13:30	2		Meeting notes go here
2012-01-10	Test2 Mentor2	Test2 Mentee2	No		No			Communication break down	

Search dates | Search mei | Search mei | Search st | Search typ | Search witl | Search star | Search len | Search reason | Search notes

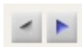
Showing 1 to 6 of 6 entries

More meetings can be displayed by

- Changing the number of entries displayed with the drop down in the upper left

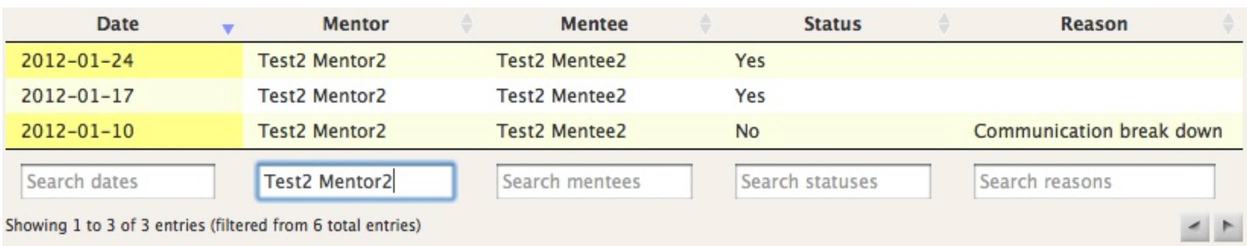


- Using the navigation buttons in the lower right



Viewing Meetings for a Specific Mentor or Mentee

The entries in the table can be filtered using the text fields at the bottom of each column. To filter for a specific mentor or mentee, simply click in the field for the appropriate column and being typing the mentor's or mentee's name. The entries displayed in the table will update as you type.



Date	Mentor	Mentee	Status	Reason
2012-01-24	Test2 Mentor2	Test2 Mentee2	Yes	
2012-01-17	Test2 Mentor2	Test2 Mentee2	Yes	
2012-01-10	Test2 Mentor2	Test2 Mentee2	No	Communication break down
Search dates	Test2 Mentor2	Search mentees	Search statuses	Search reasons

Showing 1 to 3 of 3 entries (filtered from 6 total entries)

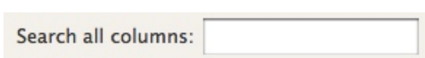
Sorting Meetings

The entries in the table can be sorted by clicking the table column headers. The column that the table is sorted by will display with a slightly different color. The blue arrow indicates whether the entires are in ascending or descending order.

Date	Mentor	Mentee	Status	Reason
2012-01-26	Test Mentor	Test Mentee	No	Illness
2012-01-24	Test2 Mentor2	Test2 Mentee2	Yes	

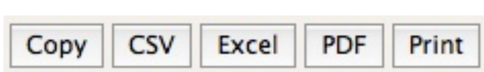
Searching Meetings

Meetings can be searched across all fields at once (as opposed to filtering each column) by typing search terms into the search box in the upper right.



Exporting Meetings

Meetings can be exported to a variety of formats by clicking the buttons in the upper right. Only visible (i.e. rows that are not filtered out) are exported, so a particular mentor's meetings could be exported by filtering using the Search Mentors box.

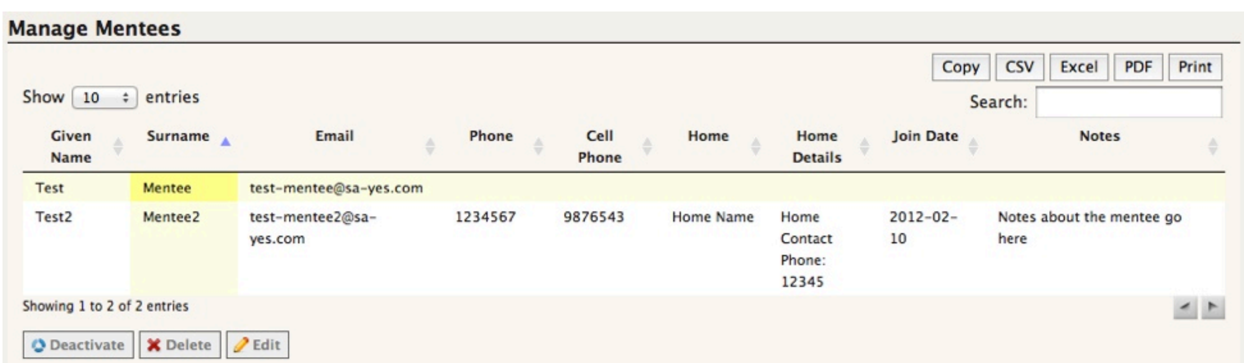


Managing Users

Viewing Users

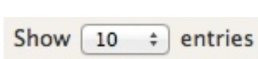
Go to the Users page. Tabs for each user type are available. Users are listed in a table under their specific tab, with columns for:

- given name
- surname
- email address
- phone number
- cell phone number
- home name (mentee only)
- home contact details (mentee only)
- join date (mentor and mentee only)
- notes

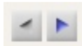


More users can be displayed by

- Changing the number of entries displayed with the drop down in the upper left



- Using the navigation buttons in the lower right



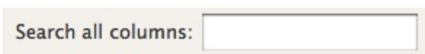
Sorting Users

The entries in the tables can be sorted by clicking the table column headers. The column that the table is sorted by will display with a slightly different color. The blue arrow indicates whether the entires are in ascending or descending order.

Given Name	Surname	Email	Phone	Cell Phone
Test	Mentor	test-mentor@sa-yes.com		
Test2	Mentor2	test-mentor2@sa-yes.com	1234567	9876543

Searching Users

Users can be searched by typing search terms into the search box in the upper right.

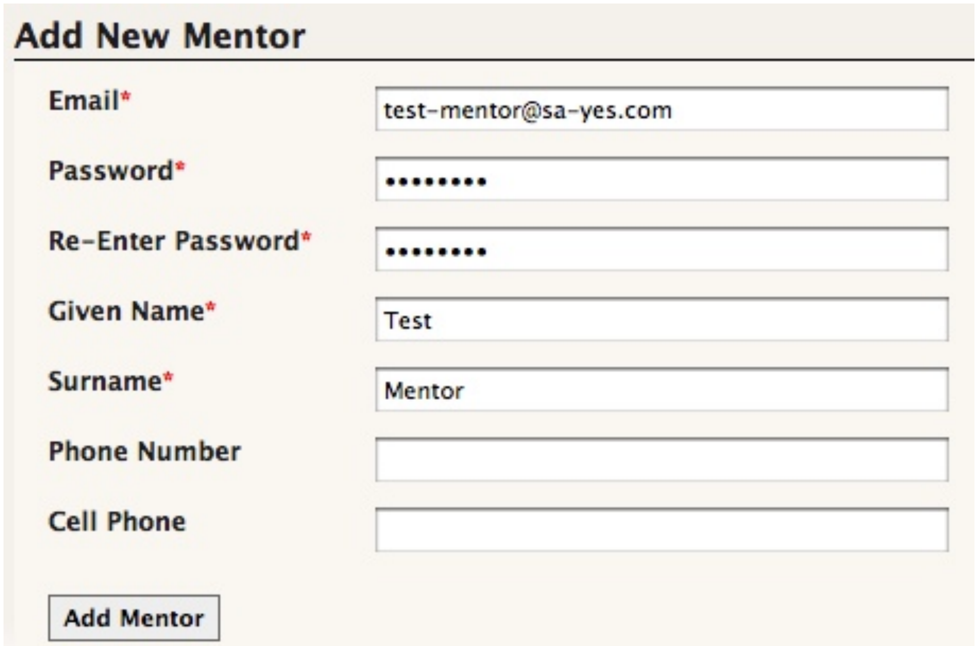


Adding New Users

To add a new user, select the appropriate tab (Mentors, Mentees, Administrators) and scroll down to the Add New User section. Fill in the fields and click the Add User button. Available fields may vary for each user type. For all user types, the following fields are required:

- email address
- password
- given name
- surname

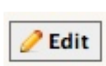
Email addresses must be unique, as they are used as the users' login credentials.



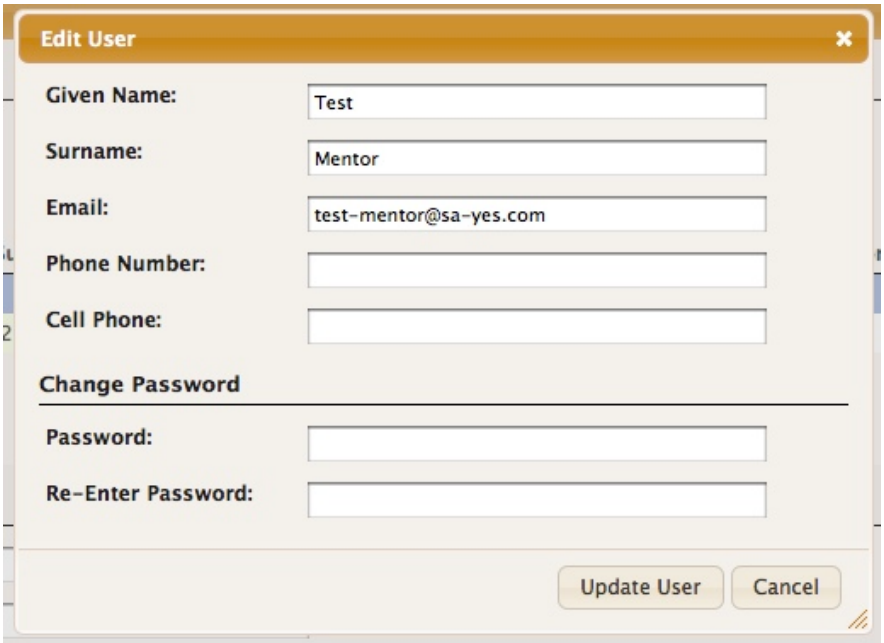
Though passwords can be changed by an administrator at any time, there is no way to view the password for a user account. It is a good idea to make a note of the password used when creating an account so that it can be sent to the user.

Editing Users

All information pertaining to a user can be modified. To edit a user's information, click on the user's row in the table to select it, then click on the Edit button at the bottom left of the table.



A dialog will appear. To edit a value, simply change the value in the text field and click the Update User button. Multiple values can be edited at the same time.

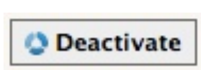


Deleting Users

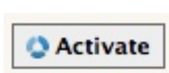
Deleting a user will remove all of the user's information from the system and it will no longer be available to either the user or administrators. **This operation cannot be undone.** To delete a user, click on the user's row in the table to select it, then click on the Delete button at the bottom left of the table.

Deactivating Users

Deactivating a user means that the user's information remains in the system and is accessible by administrators, but the user can no longer log into the system. To deactivate a user, click on the user's row in the table to select it, then click on the Deactivate button at the bottom left of the table.

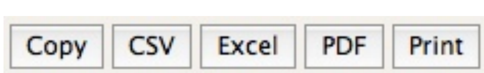


Users can be reactivated by selecting the row and click the Activate button.



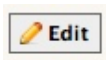
Exporting User Information

Users can be exported to a variety of formats by clicking the buttons in the upper right. Only visible (i.e. rows that are not filtered out by searching) are exported.

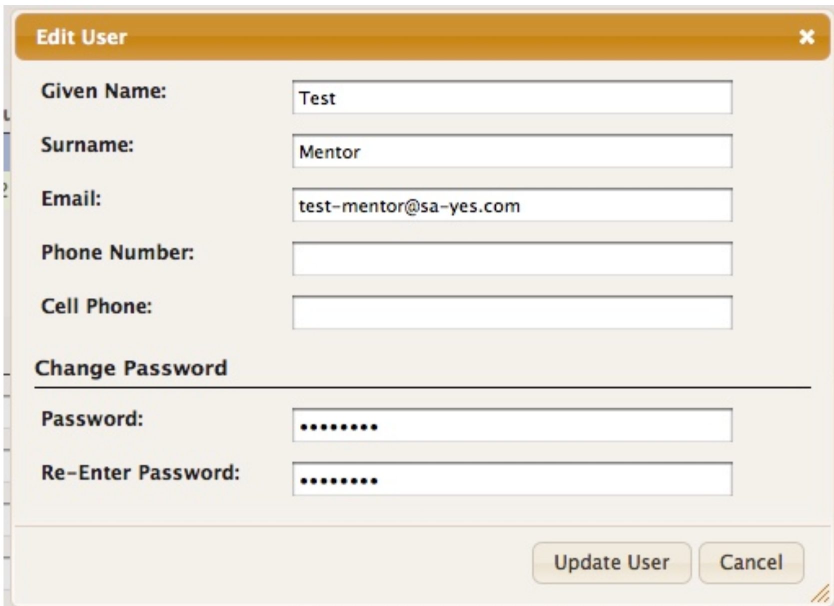


Changing a User Password

To edit a user’s password, click on the user’s row in the table to select it, then click on the Edit button at the bottom left of the table.



A dialog will appear. To edit a value, simply change the value in the text field and click the Update User button. Multiple values can be edited at the same time.

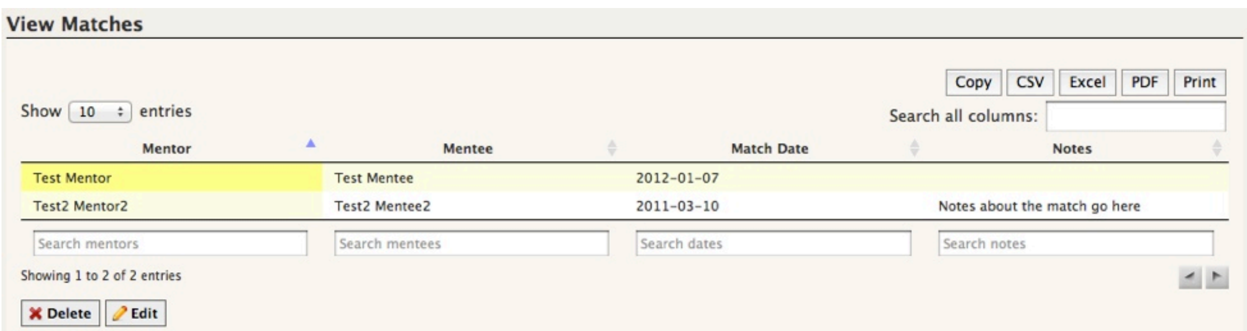


Managing Matches

Viewing Matches

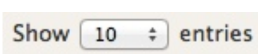
Go to the Matches tab. Matches are listed in a table, with columns for:

- mentor name
- mentee name
- match date
- notes

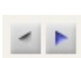


More matches can be displayed by

- Changing the number of entries displayed with the drop down in the upper left



- Using the navigation buttons in the lower right

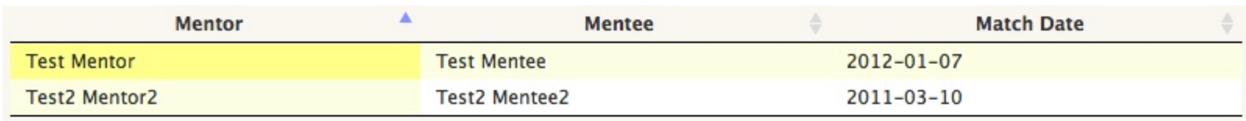


Viewing Matches for a Specific Mentor or Mentee

The entries in the table can be filtered using the text fields at the bottom of each column. To filter for a specific mentor or mentee, simply click in the field for the appropriate column and being typing the mentor's or mentee's name. The entries displayed in the table will update as you type.

Sorting Matches

The entries in the table can be sorted by clicking the table column headers. The column that the table is sorted by will display with a slightly different color. The blue arrow indicates whether the entires are in ascending or descending order.

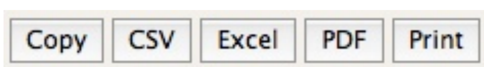


Searching Matches

Matches can be searched across all fields at once (as opposed to filtering each column) by typing search terms into the search box in the upper right.

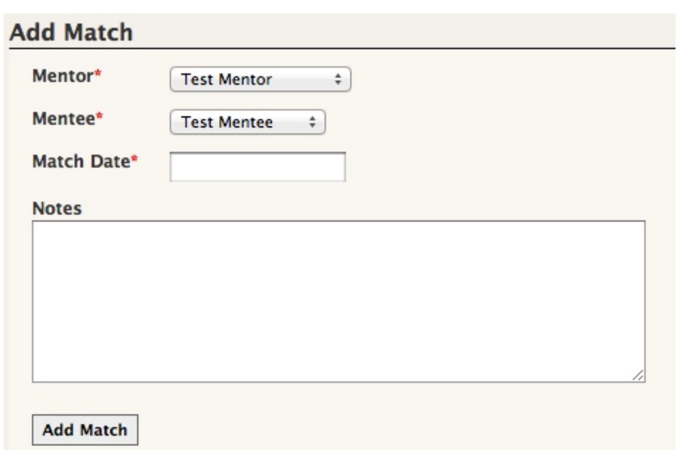
Exporting Match Information

Match information can be exported to a variety of formats by clicking the buttons in the upper right. Only visible (i.e. rows that are not filtered out) are exported, so a particular mentor's matches could be exported by filtering using the Search Mentors box.



Adding a New Match

To add a new match, scroll down to the Add Match section. All fields are required except Notes. Both the mentor and mentee must already have user accounts created. Select the mentor and mentee users from the drop downs and fill in the match date, then click the Add Match button.



Editing a Match

Only the match date can be edited. If the mentor/mentee match up is incorrect, the match should be deleted and a new one should be created. To edit the match date, click the match's row in the table to select, then click the Edit button at the bottom left of the table.

A dialog will appear. To edit the match date, simply change the value in the text field and click the Update Match button.

Deleting a Match

Deleting a match will remove the connection between the mentor and mentee, but will not remove the mentor or mentee's user accounts. **This operation cannot be undone.** To delete a match, click on the match's row in the table to select it, then click on the Delete button at the bottom left of the table.